

Footnotes 37 - 38

Jim Kirkland

From: Jim Kirkland
Sent: Monday, May 09, 2011 7:33 PM
To: Smith, Jeff
Subject: RE: Additional info

Jeff,

I got in today and am here through Friday. Any availability for dinner or a drink? Hope to see you

Jim

-----Original Message-----

From: Smith, Jeff [REDACTED]
Sent: Friday, April 22, 2011 6:53 AM
To: Jim Kirkland
Subject: RE: Additional info

Let's tentatively aim for the week of the 9th...although I don't know what [REDACTED] schedule is...

--Jeff

-----Original Message-----

From: Jim Kirkland [REDACTED]
Sent: Thursday, April 21, 2011 8:04 PM
To: Smith, Jeff
Subject: RE: Additional info

Jeff, if you are around tomorrow I thought it might be good to check in and see what you are hearing. During my DC trip I met with the FCC commissioners' staff and came away with heightened concern that the Chairman's office is too far out on this limb. The expectation is that he will continue to keep this at the bureau level and thus avoid the level of scrutiny this deserves.

BTW, Fedex has joined the coalition and it looks like the aerospace industry association will be joining as well.

To give you a little more advance warning I will be back in DC the week of my 9th and it would be great to grab dinner with you [REDACTED]. Maybe the evening of the 10th? Let me know.

Best,

Jim

-----Original Message-----

From: Smith, Jeff [REDACTED]
Sent: Wednesday, April 13, 2011 10:54 AM
To: Jim Kirkland
Cc: [REDACTED]

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Jim Kirkland

From: Jim Kirkland
Sent: Tuesday, May 17, 2011 12:29 PM
To: 'Jeffrey_M_Smith' [REDACTED]
Subject: Re: fyi

I will see you at the marriott at 815. Looking forward to it

From: Smith, Jeff [REDACTED]
Sent: Tuesday, May 17, 2011 12:21 PM
To: Jim Kirkland
Subject: fyi

Jim – got a cell phone #? I think tomorrow a.m. would be better... I have to be in meetings all day away from the WH starting at 9 a.m. at the Marriott Metro Center, 775 12th St., NW...maybe we could be there at 8:15 a.m. of so, but we'd need to confirm it today.

--Jeff [REDACTED]

From: Jim Kirkland [REDACTED]
Sent: Tuesday, May 17, 2011 12:08 PM
To: Smith, Jeff
Subject: Re: spoke too soon

Hi Jeff. I am in DC and am available after 530 today for a drink or dinner if you like and could also grab coffee tomorrow until around 1030.

A fair number of developments to talk about, including a big meeting of the affected agencies last week where OSTP was represented by Damon Wells.

Hope to see you.

Best

Jim

From: Smith, Jeff [REDACTED]
Sent: Wednesday, May 11, 2011 06:50 AM
To: Jim Kirkland
Subject: RE: spoke too soon

Well...then let's try for next week....

From: Jim Kirkland [REDACTED]
Sent: Wednesday, May 11, 2011 9:25 AM
To: Smith, Jeff
Subject: Re: spoke too soon

Darn - I spoke too soon as well. I thought a Friday meeting I had was earlier but just double checked and I will be out in Virginia meeting some defense people until after then.

I am back in town next Tuesday so coffee, drinks or dinner are all possibilities. Sorry for the confusion.

From: Smith, Jeff [REDACTED]
Sent: Wednesday, May 11, 2011 05:48 AM
To: Jim Kirkland
Subject: RE: spoke too soon

Jim - coffee at Caribou Coffee - across the corner from the WH - would work at 11:30 a.m. on Friday...plus getting you through the new WH security rules these days almost takes an act of Congress almost (and you know how well that's going these days) plus you'd appear on an official WH Visitor List which is maybe not what you want at this stage...let me know...

--Jeff

From: Jim Kirkland [REDACTED]
Sent: Wednesday, May 11, 2011 7:57 AM
To: Smith, Jeff
Subject: RE: spoke too soon

I have a 3 pm flight - could meet for coffee say 11:30 if you'd like. Let me know.

BTW, there is a big meeting today of the executive committee of what is called the Positioning Navigation Timing interagency group (deputy secretary level of DOD, DOT DHS etc) where there will be reports on interference testing to date, I believe. I'll let you know what I hear.

Are you hearing anything on your side?

Hope you are well.

Best,

Jim

From: Smith, Jeff [REDACTED]
Sent: Wednesday, May 11, 2011 7:24 AM
To: Jim Kirkland
Subject: spoke too soon

Took another look...Thursday is filled from 3 p.m. on ...does Friday work for you?

Footnote 42

Jim Kirkland

From: Jim Kirkland
Sent: Monday, June 06, 2011 7:21 PM
To: Jeff Smith
Cc: [REDACTED]
Subject: RE: FYI

Jim,

Thanks for your willingness to discuss the issue. As I mentioned to Jeff, our goal is not to make the LightSquared issue partisan and to present the GPS view of the issues to the right White House staff at the right time to support a good decision on this. Having spent a fair amount of my career seeking to help bring new competition to the broadband and telecom markets, I definitely get what the FCC is trying to do here. Let me know if there is a time window that works for you tomorrow. My mobile number is [REDACTED].

Best regards

Jim Kirkland

-----Original Message-----

From: Jeff Smith [REDACTED]
Sent: Wednesday, June 01, 2011 8:37 AM
To: Jim Kirkland
Cc: [REDACTED]
Subject: FYI

Jim Kirkland --

I reached Jim Kohlenberger on the phone yesterday. and am sending him a copy of this note...yes, he remembers you and said he'd be glad to speak with you...the best number to reach him at is his cell phone which is [REDACTED]...other number is [REDACTED]...

He is familiar with the situation...although as he was careful to point out, he may be constrained on some points...nonetheless, you can, as always, take his advice and suggestions to the bank...I told him that you may be in DC in the next few days and that he should expect a call from you...

Jim Kohlenberger -- thanks for any helpful points you can pass along...

For both of you -- on this or any other related subject or policy matter, please continue to communicate with me only on my personal email which is [REDACTED]...cell is [REDACTED]...

Best,

-- Jeff

Footnote 47

From: Jeffrey Forbes [REDACTED]
Sent: Thursday, March 18, 2010 10:28 PM
To: Bryant Hall
Subject: Fw:

Jeffrey A. Forbes
CFW
[REDACTED]

----- Original Message -----

From: jimmessina [REDACTED] <jimmessina [REDACTED]>
To: Jeffrey Forbes
Sent: Thu Mar 18 22:17:07 2010
Subject: Re:

But worried about tomorrow. I will roll pelosi to get the 4 billion. But that guy who works for bryant is setting him up: smith. Cause there is no way the language we scored for them is anywhere near 4. But hopefully the other way will, or maybe they are right. As you may have heard I am literally rolling over the house. But there just isn't 8-10 billion for something they said 2-3 for last night

-----Original Message-----

From: Jeff Forbes
To: Jim Mcssina [REDACTED]
Subject: Re:
Sent: Mar 18, 2010 10:10 PM

I hope that is true - I am not blaming you - the language was diff - russ supposedly admitted it

Jeffrey A. Forbes
CFW
[REDACTED]

----- Original Message -----

From: jimmessina [REDACTED] <jimmessina [REDACTED]>
To: Jeffrey Forbes
Sent: Thu Mar 18 22:09:23 2010
Subject: Re:

The weird thing is the donut deal. and you know russ, russ showed him the language twice. They said yes. We weren't really involved. It was russ. And I trust russ

Kindler told rahm and I that bryant was fine

-----Original Message-----

From: Jeff Forbes
To: Jim Messina [REDACTED]
Subject: Re:
Sent: Mar 18, 2010 10:04 PM

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From: Jeffrey Forbes [REDACTED]
Sent: Wednesday, June 24, 2009 1:59 PM
To: Bryant Hall; Libby Greer
Subject: FW:

From: jimmessina [REDACTED] [mailto:jimmessina [REDACTED]]
Sent: Wednesday, June 24, 2009 1:58 PM
To: Jeffrey Forbes
Subject: Re:

Yep

Sent from my Verizon Wireless BlackBerry

From: "Jeffrey Forbes"
Date: Wed, 24 Jun 2009 13:55:01 -0400
To: <jimmessina [REDACTED]>
Subject:

Hey – I guess nancy ann is speaking with the [REDACTED] who are considering sending a letter to [ACT] saying we love the 80 bil deal do the 80 bil deal – the fear is [REDACTED] may add part d on top to make the number larger so we want friendly's to push him – we need to make sure she owns this deal tomorrow, any hesitancy would be bad – I know this is annoying because obama couldn't have owned it more, but I just want to make sure - she is speaking to a totally friendly audience so it wont be a sell job, they just need to see ownership – make any sense?

Thanks

forbes

Footnotes 50 - 52

From: Jeffrey Forbes [REDACTED]
Sent: Wednesday, July 08, 2009 3:31 PM
To: Bryant Hall
Subject: Fw:

Jeffrey Forbes
CFW
[REDACTED]

From: jimmessina [REDACTED]
To: Jeffrey Forbes
Sent: Wed Jul 08 15:24:45 2009
Subject: Re:
Waxman cleaning up his quote, we are issuing "its our deal." Statement

Sent from my Verizon Wireless BlackBerry

From: "Jeffrey Forbes"
Date: Wed, 8 Jul 2009 14:45:07 -0400
To: <jimmessina [REDACTED]>
Subject: RE:
Bryant doesn't know about billy's comments – I googled and couldn't find so if you can point me in the right direction that would be great – I relish the opp to blow them up on that

From: jimmessina [REDACTED] [mailto:jimmessina [REDACTED]]
Sent: Wednesday, July 08, 2009 2:16 PM
To: Jeffrey Forbes
Subject: Re:

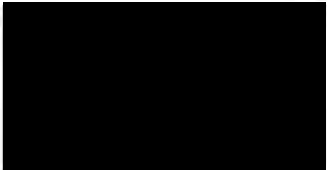
Yes, send the reporter to me

Sent from my Verizon Wireless BlackBerry

From: "Jeffrey Forbes"
Date: Wed, 8 Jul 2009 13:51:45 -0400
To: <jimmessina [REDACTED]>
Subject: Fw:

Hey - I guess she claims to have wh backing waxman - any way you can shut this down?

Jeffrey Forbes
CFW



From: Bryant Hall
To: Jeffrey Forbes
Sent: Wed Jul 08 13:51:08 2009
Subject: Fw:

Hey man - this reporter's name is Anna Edney. She is really pushing and clearly has her facts wrong.

We have to say that this is not correct - that there is an agreement with the WH that the duals price control will not be in the final package.

Plus, we now have 55 signatures on the letter and people are now calling us asking us about it.

From: Ken Johnson
To: Bryant Hall; Mimi Simoneaux Kneuer
Sent: Wed Jul 08 13:00:47 2009
Subject:

Congress Daily has called. They claim to have just spoken to a WH official who "confirmed" Waxman's assertion that the Administration is not bound to honor the agreement. Let me know how you want me to handle it. Their deadline is 1:30.

Ken Johnson
Senior Vice President
Pharmaceutical Research & Manufacturers of America



Footnotes 54 - 55

From: jimmessina [REDACTED]
Sent: Sunday, December 20, 2009 10:45 AM
To: Bryant Hall
Subject: Re: The Hill- Axelrod promises to push for drug re-importation after healthcare reform

He specifically used the safety language. He talked about it perfectly

Sent from my Verizon Wireless BlackBerry

From: "Bryant Hall" [REDACTED]
Date: Sun, 20 Dec 2009 10:45:58 -0500
To: <jimmessina [REDACTED]>
Subject: Fw: The Hill- Axelrod promises to push for drug re-importation after healthcare reform

Jim - can you translate this off line when you have a chance? I will get a lot of questions.

----- Original Message -----

From: Alicia Subasinghe
To: Lori Reilly; Timothy McClung; Rick Smith; Kendra Martello; Maya Bermingham; !Federal Affairs
Sent: Sun Dec 20 10:43:59 2009
Subject: The Hill- Axelrod promises to push for drug re-importation after healthcare reform

Axelrod promises to push for drug re-importation after healthcare reform by Kevin Bogardus 12/20/09 A senior White House adviser said Sunday that the Obama administration will push forward on safe re-importation of pharmaceutical drugs after the healthcare reform bill is finished. As a candidate in 2008, President Barack Obama promised to allow cheaper drugs to be re-imported into the United States from Canada and other countries. He also co-sponsored legislation that would allow re-importation as an Illinois senator. The Pharmaceutical Research and Manufacturers of America, a key White House ally in the healthcare reform push, has lobbied heavily against re-importation, though, and would likely not support the final bill if it was included in the package. Speaking on CNN's State of the Union, David Axelrod, Obama's top political aide, said the White House still favors drug re-importation and wants to move forward on it. "Let me be clear. The president supports re-importation. As he said, safe re-importation of drugs into this country. There's no reason why the Americans should pay a premium for pharmaceuticals that people in other countries pay less for," Axelrod said. "We will move forward on it." CNN's John King countered, "Just not in this healthcare reform?" "Yes," Axelrod said. "The president is committed to move forward once we resolve the issues that the [Food and Drug Administration (FDA)] has. That is his responsibility, to protect the American people." During debate on their healthcare reform bill, senators tried to attach language that would allow the safe re-importation of drugs into the U.S., an effort that ultimately failed. The House also did not include such a provision to their bill. The FDA has come out against such legislation, though. In a letter to Sen. Sam Brownback (R-Kan.), the agency argued that allowing drugs to be re-imported into this country would raise logistical issues as well as safety concerns.

<http://mobile.thehill.com/homenews/administration/73107-axelrod-promises-to-push-for-drug-reimportation-after-healthcare-reform>

Footnote 56

From: Jeffrey Forbes [REDACTED]
Sent: Thursday, March 18, 2010 10:17 PM
To: Bryant Hall
Subject: Fw:

Hope this Was ok

Jeffrey A. Forbes
CFW
[REDACTED]

----- Original Message -----

From: jimmessina [REDACTED] <jimmessina [REDACTED]>
To: Jeffrey Forbes
Sent: Thu Mar 18 22:09:23 2010
Subject: Re:

The weird thing is the donut deal. and you know russ, russ showed him the language twice. They said yes. We weren't really involved. It was russ. And I trust russ.

Kindler told rahm and I that bryant was fine

-----Original Message-----

From: Jeff Forbes
To: Jim Messina [REDACTED]
Subject: Re:
Sent: Mar 18, 2010 10:04 PM

Because of this donut deal - they are paying well above the 80 bil from the summer - the r's are gunning for him

Jeffrey A. Forbes
CFW
[REDACTED]

----- Original Message -----

From: jimmessina [REDACTED] <jimmessina [REDACTED]>
To: Jeffrey Forbes
Sent: Thu Mar 18 22:03:00 2010
Subject: Re:

Why?

-----Original Message-----

From: Jeff Forbes
To: Jim Messina [REDACTED]
Subject: Re:
Sent: Mar 18, 2010 9:58 PM

He is going to lose his job btw

Jeffrey A. Forbes
CFW

----- Original Message -----

From: jimmessina [REDACTED] <jimmessina [REDACTED]>
To: Jeffrey Forbes
Sent: Thu Mar 18 10:42:49 2010
Subject: Fw:

I keep hearing that he is getting right with the board by blowing us up and ginning his board up. But I refuse to care. I'm just fixing problems

Sent from my Verizon Wireless BlackBerry

From: <BHall [REDACTED]>
Date: Thu, 18 Mar 2010 10:36:32 -0400
To: <jimmessina [REDACTED]>
Subject: Re:

I absolutely appreciate it. If this works, we are good to go full throttle.

----- Original Message -----

From: jimmessina [REDACTED] <jimmessina [REDACTED]>
To: Bryant Hall
Sent: Thu Mar 18 10:34:16 2010

Thanks for the good faith offer. I hope you appreciate when the wh stepped in and said "this is fair. let's get this done". Let's all join hands and pray on cbo!

Sent from my Verizon Wireless BlackBerry

Sent from my Verizon Wireless BlackBerry

Sent from my Verizon Wireless BlackBerry

Footnotes 57 - 60

DATE	MEETING/CALL	LOCATION	GOVERNMENT PARTICIPANTS	AMA PARTICIPANTS	TOPIC
3/5/2009	Meeting	White House	White House/HHS Staff	Nielsen	Healthcare Reform Summit
3/6/2009	Meeting	White House	Kocher, Z. Emanuel	Nielsen	Health System Reform, Quality Improvement
3/11/2009	Meeting	Grand Hyatt Hotel, Washington DC	Z. Emanuel	National Advocacy Conference (NAC) Attendees	AMA National Advocacy Conference
3/19/2009	Meeting	Old Executive Office Building	DeParle	Deem	Health System Reform
3/25/2009	Meeting	White House	Z. Emanuel, Kocher, others	Rohack	Health System Reform
4/1/2009	Meeting	Old Executive Office Building	DeParle, Sebelius, WHOHR and CMS staff	Deem, Nielsen, Garikes, Patchin	Health System Reform, Quality Improvement, Medicare Physician Reimbursement Formula (SGR)
4/29/2009	Meeting	Hotel Monaco, Washington DC	DeParle	Deem, Nielsen	Reducing the Rate of Growth in Healthcare Costs (attended by several healthcare stakeholders)
5/2/2009	Meeting	Washington DC hotel	Z. Emanuel, Kocher	Deem	Reducing the Rate of Growth in Healthcare Costs
5/11/2009	Meeting	White House	President Obama, DeParle, Sebelius, Orszag, Summers, R. Emanuel	Deem, Rohack, Patchin	Reducing the Rate of Growth in Healthcare Costs
5/12/2009	Call		DeParle	Deem	Press Coverage of May 11 Meeting
5/13/2009	Call		DeParle	Deem	Reducing the Rate of Growth in Healthcare Costs
5/19/2009	Meeting	Old Executive Office Building	DeParle	Deem	AMA Health System Reform Priorities
5/26/2009	Call		DeParle	Nielsen	AMA Health System Reform Priorities
6/3/2009	Meeting	White House	DeParle	Nielsen	Health System Reform
6/11/2009	Call		DeParle	Nielsen	AMA Health System Reform Priorities
6/12/2009	Call		Z. Emanuel, Bafford, others	Nielsen, Rohack, Deem	Medical Liability Reform
6/15/2009	Meeting	Hyatt Regency Hotel, Chicago IL	President Obama	AMA House Of Delegates, AMA staff	Health System Reform (Speech to AMA House of Delegates)
6/19/2009	Call		Z. Emanuel, Bafford	Nielsen	AMA Health System Reform Priorities
6/25/2009	Meeting	White House	DeParle, Messina	Deem	AMA Health System Reform Priorities
7/8/2009	Meeting	HHS Building	Sebelius	Nielsen, Rohack, Brown	SGR Repeal, Onerous CMS Requirements
7/9/2009	Meeting	White House	DeParle, Messina	Deem	AMA Health System Reform Priorities
7/14/2009	Call		Sebelius	Rohack, Nielsen	AMA Health System Reform Priorities, Medical Liability Reform, SGR Repeal
7/24/2009	Meeting	Old Executive Office Bldg	DeParle, Tchen	Deem, Nielsen	Follow-up on Reducing the Rate of Growth in Healthcare Costs
7/31/2009	Meeting	Capitol Building	DeParle, Senate staff	Deem	AMA Health System Reform Priorities
8/7/2009	Call		DeParle	Deem	AMA Health System Reform Priorities
8/11/2009	Meeting	White House	DeParle	Deem	AMA Health System Reform Priorities
9/4/2009	Call		DeParle	Deem	AMA Health System Reform Priorities
9/7/2009	Call		DeParle	Deem	AMA Health System Reform Priorities
9/9/2009	Call		DeParle	AMA Board of Trustees	Briefing by DeParle on Healthcare Reform Prior to President's Speech to Joint Session of Congress
9/10/2009	Call		Sebelius	Rohack	AMA Member Reactions
9/28/2009	Call		DeParle	Deem	Senate Finance Committee Health System Reform Legislation
10/1/2009	Meeting	Old Executive Office Building	Hash	Deem, Brown, Garikes	Senate Finance Committee Health System Reform Legislation
10/1/2009	Call		Sebelius	Patchin	Senate Finance Committee Health System Reform Legislation
10/5/2009	Meeting	White House Rose Garden	President Obama, DeParle	Patchin, Garikes	Health System Reform, SGR Repeal
10/6/2009	Meeting	White House	DeParle, Messina	Deem	SGR Repeal

DATE	MEETING/CALL	LOCATION	GOVERNMENT PARTICIPANTS	AMA PARTICIPANTS	TOPIC
10/14/2009	Meeting	Capitol Building	DeParle, R. Emanuel, Senate Democratic Leadership and staff	Deem, Marino	Senate Legislation to Repeal SGR
10/18/2009	Call		Sebelius	Patchin	Health System Reform
10/21/2009	Meeting	White House	DeParle	Deem	SGR Repeal, Independent Medical Advisory Committee (IMAC)
10/22/2009	Call		DeParle, Senate staff	Marino	Senate Health System Reform Legislation, SGR Repeal
10/30/2009	Call		Blum	Marks, Brown, Patchin	CMS 2010 Medicare Fee Schedule Final Rules
11/2/2009	Meeting	White House	DeParle, R. Emanuel	Patchin, Deem	AMA Health System Reform Priorities, SGR Repeal
11/4/2009	Call		Sebelius	Patchin	CMS 2010 Medicare Fee Schedule Final Rules
11/12/2009	Meeting	White House	DeParle, Messina	Deem	AMA Health System Reform Priorities, SGR Repeal
11/13/2009	Meeting	Senate Finance Committee Office	DeParle, Hash, Democrat Senate Finance Committee staff	Deem, Brown, Askew, Marino	Senate Health Reform Legislation
11/19/2009	Call		DeParle	Deem	AMA Health System Reform Priorities, SGR Repeal
12/7/2009	Call		Sebelius	Patchin	Medicare Payment for Consultations
12/7/2009	Call		DeParle	Deem	Senate Health Reform Legislation
12/8/2009	Meeting	Senate Cafeteria	DeParle, Lambrew	Deem, Patchin	Senate Health Reform Legislation
12/11/2009	Meeting	Capitol Building	DeParle, Messina, Congressional staff	Deem	Senate Health Reform Legislation, SGR Repeal
12/12/2009	Call		DeParle, Messina, Congressional staff	Deem	Senate Health Reform Legislation, SGR Repeal
12/15/2009	Call		DeParle	Deem	Medicare Data Provision
12/16/2009	Call		DeParle, Messina	Deem	Senate Health Reform Legislation
12/17/2009	Call		DeParle	Deem	Senate Health Reform Legislation, Proposed Medicare Commission
12/30/2009	Call		Blum	Marks, Brown	CMS Plans for Handling Pay Freeze to Temporarily Avert 1/1/10 SGR Cut
1/9/2010	Meeting	Old Executive Office Building	Hash	Deem, Brown, Marks	Administrative Remedies for the SGR
1/12/2010	Meeting	Capitol Building	Hall, Burney, Congressional staff	Deem, Brown, Askew, Marino	Medicare Data Provision
1/13/2010	Call		DeParle, Messina	Deem	AMA Health System Reform Priorities, SGR Repeal
1/20/2010	Call		DeParle	Deem	AMA Health System Reform Priorities, SGR Repeal
1/25/2010	Call		DeParle	Deem	AMA Health System Reform Priorities, SGR Repeal
2/9/2010	Meeting	Old Executive Office Building	Hash, Lambrew, Blum, Fontenot	Deem, Brown, Garikes, Marks	Administrative Remedies for the SGR
2/18/2010	Call		DeParle	Deem	AMA Health System Reform Priorities, SGR Repeal
2/21/2010	Call		DeParle, Hash	Deem	AMA Health System Reform Priorities, SGR Repeal
2/22/2010	Call		DeParle, Hash	Deem	Independent Payment Advisory Board (IPAB), SGR Repeal
2/23/2010	Meeting	Capitol Building	DeParle, Hash, Congressional staff	Deem, Askew, Brown	AMA Health System Reform Priorities, SGR Repeal
3/2/2010	Meeting	Grand Hyatt Hotel, Washington DC	Sebelius, Benjamin, Heffler	National Advocacy Conference (NAC) Attendees	AMA National Advocacy Conference
3/5/2010	Call		Hash, Choe	Garikes, Marks	Administrative Remedies for the SGR
3/7/2010	Call		DeParle	Deem	Preparation for March 8, 2010 Meeting

DATE	MEETING/CALL	LOCATION	GOVERNMENT PARTICIPANTS	AMA PARTICIPANTS	TOPIC
3/8/2010	Meeting	White House	President Obama, DeParle, Schiliro	Deem, Rohack, Patchin	AMA Health System Reform Priorities, SGR Repeal
3/8/2010	Call		DeParle	Deem	Follow-up on March 8, 2010 Meeting
3/9/2010	Call		DeParle	Deem	AMA Health System Reform Priorities, SGR Repeal
3/10/2010	Call		DeParle, Messina	Deem	AMA Health System Reform Priorities, SGR Repeal
3/11/2010	Call		Hash, Fontenot, House/Senate Leadership, Congressional staff	Deem, Brown, Askew, Roberge, Tenover	IPAB
3/11/2010	Call		Hash	Deem	AMA Health System Reform Priorities, SGR Repeal
3/13/2010	Meeting	Capitol Building	DeParle, White House, HHS Staff	Marino, Tenover, Deem, Askew	IPAB
3/16/2010	Call		DeParle, Messina	Deem	AMA Health System Reform Priorities, SGR Repeal
3/18/2010	Meeting	White House	DeParle, Messina, Congressional staff	Deem	SGR Repeal
3/18/2010	Call		Sebellius	Patchin	SGR Repeal
4/13/2010	Meeting	Humphrey Building	Budetti	Garikes, Vargo	Fraud and Abuse
4/26/2010	Meeting	Capitol Building	DeParle, Congressional staff	Deem, Brown, Askew, Marino	SGR Repeal
5/7/2010	Call		Budetti	Garikes, Vargo	Medicare Physician Participation Enrollment and Screening
5/10/2010	Meeting	Old Executive Office Building	DeParle, Hash, Blum, Tavenner	Garikes, Marks, Brown	Administrative Remedies for the SGR
5/13/2010	Meeting	Capitol Building	DeParle, Congressional staff	Deem, Brown, Askew, Marino, Marks	Administrative Remedies for the SGR
6/11/2010	Meeting	Hyatt Regency Hotel, Chicago IL	Budetti	AMA Councils on Legislation/Medical Service, AMA staff	Fraud and Abuse
6/24/2010	Meeting	Humphrey Building	CMS staff	Vargo	Accountable Care Organizations (ACOs)
7/7/2010	Meeting	White House	DeParle	Deem	SGR Repeal
7/16/2010	Meeting	Old Executive Office Building	Hash	Garikes, Shevcheck	Funding for Quality Measures
7/30/2010	Meeting	Humphrey Building	Budetti, Smolonsky	Vargo, Garikes	Fraud and Abuse
8/4/2010	Meeting	White House	DeParle, Z. Emanuel, Berwick	Garikes, Vargo	ACOs and Antitrust Relief
8/17/2010	Meeting	Humphrey Building	Lee	Garikes, Vargo	ACOs
9/1/2010	Meeting	Humphrey Building	Berwick	Wilson, Hoven, Maves, Deem, Brown, Garikes	Healthcare Delivery Reform, ACOs, Center for Medicaid/Medicare Innovation, SGR Repeal, Regulatory Burden
9/8/2010	Meeting	Old Executive Office Building	DeParle, Cutter	Deem	Affordable Care Act (ACA) Communications
9/10/2010	Meeting	Humphrey Building	Rogers	Garikes	Center for Medicare and Medicaid Innovation Implementation
9/23/2010	Meeting	AMA Washington DC Offices	Mentnech, Postma, Cohen	Garikes, Marks	Medicare Demonstration Projects
9/23/2010	Call		Morris	Garikes, Vargo	Physician Identity Theft
10/5/2010	Meeting	CMS Building, Baltimore, MD	CMS staff	Wilson, Vargo	ACO Workshop
10/19/2010	Meeting	AMA Washington DC Offices	Budetti	Vargo, Garikes	Fraud and Abuse
10/25/2010	Call		CMS	Garikes, Marks	Episode Grouper Project
11/1/2010	Meeting	White House	DeParle, Schiliro	Deem	SGR Repeal
11/11/2010	Call		Berwick	Wilson, Hoven, Maves	ACOs

DATE	MEETING/CALL	LOCATION	GOVERNMENT PARTICIPANTS	AMA PARTICIPANTS	TOPIC
11/15/2010	Meeting	Old Executive Office Building	Senior White House staff	Wilson, Vargo, Hoven, AMA-invited physician participants	Structure of ACOs
12/9/2010	Call		Berwick	Wilson	e-Prescribing, Retroactive Medicare Payment Adjustments
12/13/2010	Call		Agency for Healthcare Research and Quality (AHRQ) staff	Vargo	Medical Liability Reform Demonstration Projects
1/11/2011	Meeting	Humphrey Building	Fowler, Larsen	Deem, Burke	Excess Major Medical Policies
2/9/2011	Meeting	Grand Hyatt Hotel, Washington DC	Berwick, Blum	National Advocacy Conference (NAC) Attendees	AMA National Advocacy Conference
2/10/2011	Meeting	Grand Hyatt Hotel, Washington DC	Rapp, Blumenthal	National Advocacy Conference (NAC) Attendees	AMA National Advocacy Conference
3/7/2011	Meeting	HHS Building	HHS, OIG staff	Vargo, Garikes	Fraud and Abuse
3/9/2011	Meeting	Old Executive Office Building	Lambrew, Fowler	Deem	ACA Implementation Issues
3/16/2011	Call		Berwick, Blumenthal	Wilson	Medicare Incentive Program Regulations
3/19/2011	Call		Agrawal	Vargo	Fraud and Abuse
4/1/2011	Meeting	Humphrey Building	Cohen	Deem, Burke	Excess Major Medical Policies
4/19/2011	Call		Berwick	Wilson	AMA Comments on Proposed ACO Regulations
4/20/2011	Meeting	Old Executive Office Building	Lambrew, Fowler, Fontenot	Deem, Garikes	IPAB

Footnote 63

**AARP Energy & Commerce Committee Inquiry
Response to Request 2**

Meeting or Telephone Call	Date	Subject	AARP Participants	Government Participants	Government Organization
TC	Various	Coordinating calls with Valerie Jarrett's staff leading up to participation at Member Event	Nicole Duritz	Valerie Jarrett's Staff	WH
TC	Various	Coordinating calls with Secretary Sebelius's staff leading up to participation at Member Event	Nicole Duritz	Secretary Sebelius's Staff	HHS
TC	03/03/09	Logistics relating to AARP Public Policy Institute Chronic Care Solutions Forum	Rhonda Richards Others	Neera Tanden (panelist)	WH
TC	03/13/09	Logistics relating to AARP Public Policy Institute Chronic Care Solutions Forum	Rhonda Richards Others	Neera Tanden (panelist)	WH
M	03/17/09	Reconciliation package	Anna Schwamlein Howard	Nancy-Ann DeParle Representatives from the House and Senate	WHOHR
M	03/23/09	AARP Public Policy Institute Chronic Care Solutions Forum, held at Hart Senate Office Building	Rhonda Richards	Neera Tanden (panelist)	WH
M	04/02/09	Discussion of AARP's positions on health care reform	Barry Rand Nancy LeMond	Rahm Emanuel	WH
M	04/07/09	Discussion of AARP's positions on health care reform	David Sloane Paul Cotton	Nancy-Ann DeParle	WHOHR
M	04/17/09	Discussion of AARP's positions on health care reform	Nancy LeMond David Sloane Craig Langford	Nancy-Ann DeParle	WHOHR

Meeting or Telephone Call	Date	Subject	AARP Participants	Government Participants	Government Organization
M	05/12/09	Discussion of AARP's positions on health care reform	Barry Rand Nancy LeaMond David Sloane	Secretary Sebelius	HHS
M	05/12/09	Discussion of AARP's positions on health care reform	Nancy LeaMond David Sloane Craig Langford	Jim Messina	WH
TC	05/15/09	General Health Care Reform Goals	Barry Rand Nancy LeaMond	Rahm Emanuel	WH
M	05/29/09	Discussion of AARP's positions on health care reform	Nancy LeaMond Elaine Ryan Nora Super	Lauren Aronson Michael Hash	WH HHS
TC	06/11/09	Discussion of AARP's positions on health care reform	Barry Rand	Rahm Emanuel	WH
TC	06/11/09	Discussion of AARP's positions on health care reform	Nancy LeaMond David Sloane Craig Langford	Nancy-Ann DeParle	WHOHR
M	06/17/09	Meeting with Senator Baucus regarding Health Care Reform	Barry Rand Nancy LeaMond	Rahm Emanuel	WH
M	06/19/09	Press Conference on Health Care Reform	Barry Rand	White House Officials	WH
M	06/22/09	Press Conference on Prescription Drugs	Barry Rand Nancy LeaMond Andrew Nannis Nora Super	White House Officials	WH
M	06/22/09	Discussion of AARP's positions on health care reform	Barry Rand Nancy LeaMond	Valerie Jarrett	WH
M	07/01/09	Introductory meeting with Nancy-Ann DeParle and AARP staff	Erika Stratmann Others	Nancy-Ann DeParle	WHOHR
TC	Mid July 2009	Vice President Biden's Task Force on the Middle Class	Martin Burns Fred Griesbach Jodi Sakol	Vice President's Staff	WH

Meeting or Telephone Call	Date	Subject	AARP Participants	Government Participants	Government Organization
M	07/13/09	AARP Priorities in Health Care Reform	John Rother	Nancy-Ann DeParle	WHOHR
M	07/20/09	Affordability of Health Care Reform	John Rother David Sloane Nancy LeaMond	Peter Orszag Nancy-Ann DeParle	WH WHOHR
M	07/21/09	Health Care Reform: Statutory PayGo and IPAB	John Rother David Certner Cristina Martin Firvida	Peter Orszag Ezekiel Emanuel Nancy-Ann DeParle Keith Fontenot	WH WHOHR
TC	07/22/09	Discussion of AARP's positions on health care reform	Barry Rand	Valerie Jarrett	WH
TC	07/27/09	Discuss details of Facebook/Live Stream of tele-town hall	Ken Nickell	White House Social Media Staff	WH
M	07/27/09	Discussion of AARP's positions on health care reform	Barry Rand	White House Officials	WH
M	07/27/09	Discussion of AARP's positions on health care reform	Nancy LeaMond David Sloane	Nancy-Ann DeParle	WHOHR
TC	07/28/09	Tele-town hall by President Obama to AARP employees and members	AARP Employees	President Obama	WH
M	09/08/09	Protecting seniors in health reform	Nancy LeaMond Joseph Liu	Valerie Jarrett Michael Strautmanis Nancy-Ann DeParle Linda Douglas	WH WHOHR
TC	09/10/09	Discussion of AARP's positions on health care reform	Nancy LeaMond Joseph Liu	White House Officials	WH
TC	09/22/09	Discussion of AARP's positions on health care reform	Barry Rand	Valerie Jarrett	WH
TC	09/29/09	Discussion of AARP's positions on health care reform	Barry Rand	Rahm Emanuel	WH
M	10/14/09	Discussion of AARP's positions on health care reform	David Sloane	Ann Widger	WH

Meeting or Telephone Call	Date	Subject	AARP Participants	Government Participants	Government Organization
M	10/14/09	Elder Justice Act	Rhonda Richards	Kathy Greenlee Others	HHS
M	10/14/09	Discussion of AARP's positions on health care reform	Nora Super	Kavita Patel	WH
M	10/19/09	Discussion regarding how older Americans are reacting to health care reform debate	Craig Langford Nancy LeaMond	Nancy-Ann DeParle Linda Douglass Dan Pfeiffer	WHOHR
M	10/22/09	Event for AARP members on Health Care Reform	Barry Rand	Valerie Jarrett	WH
M	10/29/09	Biogenerics	Nora Super	Nancy-Ann DeParle Keith Fontenot Lauren Aronson	WHOHR WH
M	11/03/09	Discussion of AARP's priorities and positions on health care reform	Barry Rand Nancy LeaMond John Rother	Rahm Emanuel Jim Messina Nancy-Ann DeParle	WH WHOHR
TC	11/05/09	Health Care Reform and Public Engagement	John Rother	Secretary Sebelius White House Officials	HHS WH
TC	11/05/09	Call with AARP members regarding health care reform	Nora Super Cheryl Matheis	Nancy-Ann DeParle	WHOHR
TC	12/02/09	Discussion of AARP's positions on health care reform	Barry Rand	Valerie Jarrett	WH
M	12/03/09	Discussion of AARP's priorities and positions on health care reform	Barry Rand John Rother Nancy LeaMond	Rahm Emanuel Valerie Jarrett Jim Messina	WH
M	12/07/09	Discussions regarding the Donut Hole	Nora Super	Valerie Jarrett Nancy-Ann DeParle	WH WHOHR
M	12/08/09	Discussions with Senate Finance Committee regarding the Donut Hole	Barry Rand Nancy LeaMond Nora Super David Sloan	Valerie Jarrett Nancy-Ann DeParle Jim Messina	WH WHOHR

Meeting or Telephone Call	Date	Subject	AARP Participants	Government Participants	Government Organization
M	12/15/09	Discussion of AARP's positions on health care reform	Barry Rand	White House Officials	WH
M	12/16/09	Discussions with other Advocacy Groups and CMS Officials on Medicare issues	David Sloane Nora Super	Jonathan Blum Timothy Hill	HHS
M	01/20/10	Nursing home transparency and criminal background checks	Rhonda Richards	CMS Officials	HHS
M	01/21/10	Community Living Initiative and Health Care Reform stakeholder meeting	Rhonda Richards	HHS Office on Disability	HHS
TC	01/25/10	Briefing Call on Health Care Reform	David Sloane	Senior Administration Officials	WH
M	01/27/10	Eldercare Workforce Alliance: workforce issues and health care reform provisions	Rhonda Richards	Mary Wakefield Others	HHS
M/TC	02/23/10	Health Care Reform Briefing	Barry Rand Nancy LeaMond John Rother David Sloane Nancy Smith Tom Nelson	White House Officials	WH
M	03/03/10	Leadership Council of Aging Organizations meeting with health care reform speaker	Rhonda Richards Others	White House Office of Health Care Reform	WHOHR
TC	03/03/10	Discussion of AARP's positions on health care reform	Barry Rand Nancy LeaMond	Jim Messina Valerie Jarrett	WH
TC	03/09/10	Discussion of AARP's positions on health care reform	David Sloane	Jim Messina	WH
TC	03/12-13/10	Organizing Event in OH addressing Health Care Reform and Older Americans	Kristin Keckeisen	Ann Widger	WH

Meeting or Telephone Call	Date	Subject	AARP Participants	Government Participants	Government Organization
TC	03/22/10	Discussion of AARP's positions on health care reform	Barry Rand	Valerie Jarrett	WH
M	03/23/10	Academy Health Panel on the Community Living Assistance Services and Supports (CLASS) Program	Rhonda Richards (panelist)	Richard Frank (panelist)	HHS
TC	03/30/10	Discussion of AARP's positions on health care reform	Barry Rand	Valerie Jarrett	WH
M	04/05/10	Legislation and Advocacy - Get Acquainted/Coordination Meeting	David Sloane Elaine Ryan Larry White	Edwin Walker Moya Thompson	HHS
TC	04/07/10	Medicare Advantage Part D	Nora Super	Jonathan Blum Cynthia Tudor	HHS
M	04/08/10	Various topics relating to seniors	Barry Rand John Rother Others	Peter Orszag	WH
M	04/15/10	Implementation of Medicaid-related provisions of PPACA	Paul Cotton JoAnn Lamphere Elaine Ryan Rhonda Richards	Cindy Mann Mary Kennedy Barbara Edwards	HHS
M	04/15/10	Discussion of AARP's positions on health care reform	Nancy LeaMond	Nancy-Ann DeParle	WHOHR
M	04/15/10	Discussion of AARP's positions on health care reform	Nora Super	Nancy-Ann DeParle Jeanne Lambrew	WHOHR
TC	04/22/10	Preparation for webinar with HHS/CMS/Administration on Aging	Nora Super	HHS/CMS/AoA Officials	HHS
M	04/27/10	AARP's Outreach and Education Plans related to health care reform	Nicole Duritz Others	Nancy-Ann DeParle	WHOHR
M	04/27/10	Discussion of AARP's positions on health care reform	Nancy LeaMond Jon Dauphine	Nancy-Ann DeParle	WHOHR

Meeting or Telephone Call	Date	Subject	AARP Participants	Government Participants	Government Organization
M	05/04/10	Health Care Reform: Implementation, Public Education, and Outreach	Barry Rand Nancy LeMond John Rother	Secretary Sebelius	HHS
M	05/12/10	Health Care Reform Implementation	John Rother Nancy LeMond Craig Langford	Secretary Sebelius Kathy Greenlee Ann Widger	HHS
M	05/14/10	Meeting with Office of Consumer Information and Insurance Oversight on pre-existing condition plans	Nicole Duritz Nora Super	Karen Pollitz Ann Widger	HHS
M	06/14/10	Discussion of efforts to fight fraud in health care reform	Nicole Duritz	OIG Officials	HHS
M	06/15/10	AARP Public Policy Institute Roundtable Regarding Implementation of CLASS Program	Ilene Henshaw Rhonda Richards Susan Reinhard	Richard Frank Henry Claypool Others	HHS
M	06/23/10	Stakeholder briefing regarding high risk pools	Nora Super	White House Officials	WH
M	06/29/10	Discussion of AARP's positions on health care reform	Nicole Duritz	Peter Budetti	HHS
M	08/06/10	Discussions with American Cancer Society Office on Exchanges	Nora Super Cheryl Matheis	Nancy-Ann DeParle HHS Officials	WHOHR HHS
M	08/13/10	Discussion of AARP's positions on health care reform	Nicole Duritz	Peter Budetti	HHS
M	08/19/10	Preview of and discussions regarding Plan Finder	Nora Super	CMS Officials	HHS
M	08/30/10	Implementation of Nursing Home Transparency Provisions of PPACA stakeholder meeting	Ilene Henshaw Rhonda Richards	Thomas Hamilton Cindy Graunke CMS Officials	HHS
TC	09/01/10	Discussion of AARP's positions on health care reform	Nancy LeMond	Nancy-Ann DeParle	WHOHR

Meeting or Telephone Call	Date	Subject	AARP Participants	Government Participants	Government Organization
M	09/10/10	Discussions regarding Quality Agenda	Nicole Duritz Nancy LeaMond John Rother Nora Super	Peter Lee Don Berwick	HHS
M	09/15/10	Discussion of AARP's positions on health care reform	Nancy LeaMond	Nancy-Ann DeParle Stephanie Cutter	WHOHR
M	10/01/10	Feature Session: The New Health Law & You	Barry Rand	Secretary Sebelius	HHS
M	10/01/10	Greet Secretary Sebelius	Barry Rand CB Wismar Nancy LeaMond Paul Anderson	Secretary Sebelius	HHS
TC	11/16/10	Discussion of AARP's positions on health care reform	Nancy LeaMond	Nancy-Ann DeParle	WHOHR
TC	11/22/10	Discussion of AARP's positions on health care reform	Barry Rand	Valerie Jarrett	WH
Webinar	11/22/10	CHCS Webinar: Roadmap for Long-Term Supports and Services- State Innovations and Opportunities	Erika Stratmann Others	CMS Officials	HHS
M	12/02/10	AARP Pubic Policy Institute Roundtable on Home and Community Based Services Medicaid Options	Erika Stratmann Ilene Henshaw Rhonda Richards Elaine Ryan JoAnn Lamphere Susan Reinhard	Barbara Edwards Melissa Hulbert Mary Sowers Linda Peltz Melanie Bella Others from CMS	HHS
TC	Week of December 6 and 13, 2010	Discussions regarding AARP member attendance at SGR signing ceremony	Martin Burns Craig Langford Others	White House Officials	WH
M	12/15/10	Discussion on Essential Benefits	Leah Hirsch	HHS Officials	HHS

Meeting or Telephone Call	Date	Subject	AARP Participants	Government Participants	Government Organization
M	12/20/10	Consumer Organizations Meeting	Nora Super	Ann Widger Steve Larsen Karen Pollitz	HHS
TC	01/06/11	Market Reform Coalition discussing ACA and market reforms	Leah Hirsch	Karen Pollack	HHS
M	01/06/11	Discussion of AARP's positions on health care reform	Nancy LeaMond	White House Officials	WH
TC	01/12/11	Marketing Health Care Reform	Barry Rand	Valerie Jarrett	WH
M	01/13/11	Discussion of insurance reform regulation	Nora Super	Steve Larsen Karen Pollitz	HHS
M	01/18/11	Marketing Health Care	Barry Rand Nancy LeaMond John Rother	Valerie Jarrett	WH
M	01/31/11	Discussion of AARP's positions on health care reform	Nancy LeaMond	Nancy-Ann DeParle	WHOHR
M	02/03/11	Federal Coordinated Health Care Office (FCHCO) Stakeholders Meeting	Ilene Henshaw Rhonda Richards	Edo Banach Melanie Bella	HHS
M	02/18/11	Discussion of AARP's positions on health care reform	Nancy LeaMond Nora Super JoAnn Lamphere	Jeanne Lambrew Melody Barnes	WHOHR
M	02/18/11	HHS Meeting with consumer groups and industry groups to discuss the role of agents and brokers around MLR (medical loss ratio) part of ACA	Leah Hirsch	Steve Larsen Joel Ario Liz Fowler Gary Cohen	HHS
TC	02/21/11	Discussion of AARP's positions on health care reform	Leah Hirsch	Gary Cohen	HHS
M	03/08/11	Health Affairs Innovation in Health Care Delivery	Erika Stratmann	Hoangmai Pham Melinda Buntin	HHS

Meeting or Telephone Call	Date	Subject	AARP Participants	Government Participants	Government Organization
M	03/18/11	Discussion of AARP's positions on health care reform	Nancy LeaMond Nora Super JoAnn Lamphere	Nancy-Ann DeParle Stephanie Cutter	WHOHR
M	03/18/11	Discuss new White House Structure	Nancy LeaMond Nora Super JoAnn Lamphere	Jeanne Lambrew Melody Barnes	WHOHR
M	03/22/11	Meaningful Use Committee	Leah Hirsch	HHS Officials	HHS
M	03/30/11	Consumer Organizations Meeting	Nora Super	Ann Widger Steve Larsen Karen Pollitz	HHS
M	04/15/11	Discussion of AARP's positions on health care reform	Nancy LeaMond	Jeanne Lambrew	WHOHR

**AARP Energy & Commerce Committee Inquiry
Supplemental Response to Request 2**

Meeting or Telephone Call	Date	Subject	AARP Participants	Government Participants	Government Organization
TC	06/12/09	Donut Hole	Nora Super John Rother David Sloane Nancy LeaMond	Michael Hash Rahm Emanuel Nancy-Ann DeParle Lauren Aronson	WH
TC	02/25/10	CMS Briefing – 45 Day Advance Notice and Call Letter	Nora Super	HHS/CMS Officials	HHS/CMS
M	04/15/09	Meeting on Healthcare	David Sloane	Jim Messina Representatives from the House and Senate	WH
TC	07/24/09	Discussion of AARP's positions on health care reform	Nora Super	Lauren Aronson	WH
M	11/23/09	Medicare Commission Discussion	David Certner Elaine Ryan Nancy LeaMond John Rother Cheryl Matheis Andrew Nannis James Dau Paul Cotton Ahaviah Glaser Anna Schwamlein Howard Rhonda Richards Cristina Martin-Firvida Sarah Thomas	Michael Hash Chris Dawe Jeremy Sharp	HHS

Footnote 64

	A	B	C	D	E
1	List of AHA Meetings with Representatives of the White House, WHOHR, and HHS -- DRAFT 07-19-2011				
2	Meeting Date	AHA Personnel	AHA Position	WH/Administration Personnel	Subject of Meeting
3	5-Mar-09	Richard Umbdenstock	President	Barack Obama -- WH Melody Barnes -- Domestic Policy Council ("DPC") Bob Kocher -- National Economic Council ("NEC") Valerie Jarrett -- WH Zeke Emanuel -- WH Peter Orszag -- Office of Management and Budget ("OMB") Nancy-Ann DeParle -- WHOHR Diana Farrel -- NEC Larry Summers -- NEC Neera Tanden -- HHS	White House Health Care Summit
4		Richard Umbdenstock	President		
5	25-Mar-09	Richard Pollack	Executive Vice President	Nancy-Ann DeParle -- WHOHR	Health Reform
6		Linda Fishman	Senior Vice President, Public Policy Analysis and Development		
7	30-Mar-09	Linda Fishman	Senior Vice President, Public Policy Analysis and Development	Zeke Emanuel -- WH	Readmissions
8		Richard Umbdenstock	President		
9	6-Apr-09	Richard Pollack	Executive Vice President	Tina Tchen -- WH	White House Outreach Plans
10		Richard Umbdenstock	President		
11	20-May-09	Linda Fishman	Senior Vice President, Public Policy Analysis and Development	Jonathan Blum -- HHS	Inpatient Prospective Payment Rule
12	22-May-09	Richard Umbdenstock	President	Nancy-Ann DeParle -- WHOHR	Get Acquainted Lunch
13	12-Jun-09	Thomas Nickels	Senior Vice President, Federal Relations	Nancy-Ann DeParle -- WHOHR	Discussion re: Health Reform
14		Linda Fishman	Senior Vice President, Public Policy Analysis and Development	Jim Messina -- WH	
15	15-Jun-09	Thomas Nickels	Senior Vice President, Federal Relations	Nancy-Ann DeParle -- WHOHR Mike Hash -- WH Rahm Emanuel -- WH Jim Messina -- WH	Discussion re: Health Reform
16	30-Jun-09	Richard Umbdenstock	President	Kathleen Sebelius -- HHS	Get Acquainted Lunch with Kansas Hospital
17		Linda Fishman	Senior Vice President, Public Policy Analysis and Development		
18		Thomas Nickels	Senior Vice President, Federal Relations	Nancy-Ann DeParle -- WHOHR	
19	30-Jun-09	Linda Fishman	Senior Vice President, Public Policy Analysis and Development	Jim Messina -- WH Mike Hash* -- WH	Discussion re: Health Reform
20					
21	1-Jul-09	Thomas Nickels	Senior Vice President, Federal Relations	Nancy-Ann DeParle-WHOHR Mike Hash -- WH Linda Douglas -- WH	Discussion re: Health Reform
22	8-Jul-09	Thomas Nickels	Senior Vice President, Federal Relations	Joe Biden -- WH Nancy-Ann DeParle-WHOHR Mike Hash -- WH Other Personnel (identity unknown)	Press Conference Announcement of Health Care Reform Agreement
23	10-Jul-09	Thomas Nickels	Senior Vice President, Federal Relations		
24		Richard Pollack	Executive Vice President	Jim Messina -- WH	PPACA

	F
1	
2	Location
3	WH
4	Old Executive Office Building
5	("OEB")
6	
7	OEB
8	
9	WH
10	
11	HHS's Humphrey Building ("HB")
12	WH
13	WH
14	
15	WH
16	HB
17	
18	
19	WH
20	
21	Telephone Conference
22	WH
23	WH
24	

	A	B	C	D	E
1	List of AHA Meetings with Representatives of the White House, WHOHR, and HHS -- DRAFT 07-19-2011				
2	Meeting Date	AHA Personnel	AHA Position	WH/Administration Personnel	Subject of Meeting
25	16-Sep-09	Richard Umbdenstock	President	Bob Kocher -- NEC	Clinical Integration Priorities
26	19-Oct-09	Linda Fishman	Senior Vice President, Public Policy Analysis and Development	Elizabeth Bafford -- OMB	Barriers to Clinical Integration
27		Richard Umbdenstock	President	Zeke Emanuel -- WH	
28	29-Oct-09	Richard Umbdenstock	President	Kathleen Sebelius -- HHS	Large Group Meeting for Health Reform Update
29	3-Dec-09	Richard Umbdenstock	President	Nancy-Ann DeParle -- WHOHR	Impact of Cuts on Coverage
30	8-Dec-09	Tom Nickels	Senior Vice President, Federal Relations	Nancy-Ann DeParle -- WHOHR	Discussion re: Health Reform
31	7-Jan-10	Linda Fishman	Senior Vice President, Public Policy Analysis and Development	Mike Hash -- WH	Readmissions
32		Richard Pollack	Executive Vice President	Zeke Emanuel -- WH	
33	23-Feb-10	Richard Pollack	Executive Vice President	Marilyn Tavenner -- HHS	Meet and Greet
34		Linda Fishman	Senior Vice President, Public Policy Analysis and Development		
35	22-Mar-10	Linda Fishman	Senior Vice President, Public Policy Analysis and Development	Karen Matsuoko -- OMB	Health Information Technology
36		Richard Umbdenstock	President	Zeke Emanuel -- WH	
37	4-May-10	Richard Umbdenstock	President	Joe Biden -- WH Kathleen Sebelius -- HHS	Grant Announcement re: Beacon Community Program (HIT)
38	18-Jun-10	Richard Pollack	Executive Vice President	Marilyn Tavenner -- HHS	Inpatient Prospective Payment Rule
39		Linda Fishman	Senior Vice President, Public Policy Analysis and Development	Jonathan Blum -- HHS	
40	23-Jun-10	Linda Fishman	Senior Vice President, Public Policy Analysis and Development	Ariel Levin -- WH Mark Vinkenes -- OMB Other OMB Staff (cannot recall identity)	Inpatient Prospective Payment Rule
41	2-Aug-10	Richard Umbdenstock	President	Don Berwick -- HHS	Preparation for Presentation to Meeting of State Hospital Associations on General CMS Issues
42	14-Sep-10	Richard Umbdenstock	President	Don Berwick -- HHS	Presentation to Meeting of State Hospital Associations on General CMS Issues
43	21-Sep-10	Richard Umbdenstock	President	Don Berwick -- HHS	Various HHS Regulations
44	1-Nov-10	Richard Umbdenstock	President	Don Berwick -- HHS	CMS Strategic Plan
45	15-Nov-10	Richard Pollack	Executive Vice President	Nancy-Ann DeParle -- WHOHR	Background Preparation for DeParle as Guest Speaker at AHA Board Meeting
46		Richard Umbdenstock	President		
47		Linda Fishman	Senior Vice President, Public Policy Analysis and Development		
48	18-Nov-10	Richard Pollack	Executive Vice President	Nancy-Ann DeParle -- WHOHR	Brief Remarks to AHA Board of Trustees re: Various Health Issues
49		Richard Umbdenstock	President		
50		Linda Fishman	Senior Vice President, Public Policy Analysis and Development		
51	29-Nov-10	Richard Umbdenstock	President	Don Berwick -- HHS	Post Acute Care Issues
52		Linda Fishman	Senior Vice President, Public Policy Analysis and Development	Jonathan Blum -- HHS	
53	30-Nov-10	Richard Umbdenstock	President	Zeke Emanuel -- WH	Clinical Integration
54		Linda Fishman	Senior Vice President, Public Policy Analysis and Development		
55	21-Dec-10	Richard Umbdenstock	President	Kathleen Sebelius -- HHS	Health Information Technology Regulations
56	22-Dec-10	Richard Umbdenstock	President	Nancy-Ann DeParle -- WHOHR	National Patient Safety Initiative
57	22-Dec-10	Richard Umbdenstock	President	Don Berwick -- HHS	National Patient Safety Initiative

	F
1	
2	Location
25	Telephone Conference
26	OEB
27	
28	HB
29	Telephone Conference
30	Antechamber/Vice President's office U.S. Capitol
31	OEB
32	
33	Downtown, Washington, DC
34	
35	New Executive Office Building
36	
37	WH
38	HB
39	
	New Executive Office Building
40	
	Telephone Conference
41	
	Downtown, Washington, DC
42	
43	HB
44	HB
45	
46	OEB
47	
48	
49	Chicago, IL
50	
51	HB
52	
53	OEB
54	
55	Telephone Conference
56	OEB
57	Telephone Conference

	A	B	C	D	E
1	List of AHA Meetings with Representatives of the White House, WHOHR, and HHS -- DRAFT 07-19-2011				
2	Meeting Date	AHA Personnel	AHA Position	WH/Administration Personnel	Subject of Meeting
58	6-Jan-11	Richard Umbdenstock	President	Kathleen Sebelius -- HHS Don Berwick -- HHS	National Patient Safety Initiative and Reaction to ACA Repeal Efforts
59	7-Jan-11	Richard Umbdenstock	President	Nancy-Ann DeParle -- WHOHR	Reaction to ACA Repeal Efforts
60	25-Jan-11	Richard Pollack	Executive Vice President	Jack Lew -- OMB	Federal Budget, PPACA and Health Information Technology Regulations
61		Linda Fishman	Senior Vice President, Public Policy Analysis and Development		
62	7-Feb-11	Richard Umbdenstock	President	Don Berwick -- HHS	Meeting with AHA Members on Various CMS Issues
63	8-Apr-11	Richard Pollack	Executive Vice President	Marilyn Tavenner -- HHS	PPACA Anniversary Press Coverage
64	*Attendance is not certain				

	F
1	
2	Location
58	HB
59	Telephone Conference
60	OEB
61	
62	Downtown, Washington, DC
63	Telephone Conference
64	

Footnote 65

AHIP's Initial Response to Committee Questions 1 and 2
DRAFT

Scheduled Event Date	Nature of Event	Scheduled Duration	Individuals Scheduled to Participate	Scheduled Subject
03/03/09	Call	30 minutes	AHIP: Ignagni, Karen U.S. Government: Emanuel, Zeke	Administrative simplification
03/05/09	Meeting	4 hours	AHIP: Ignagni, Karen U.S. Government: President Barack Obama, Senior WH Officials	White House Forum on Health Reform
03/06/09	Meeting	1 hour	AHIP: Ignagni, Karen; Donahue, Mary Beth; Kanwit, Stephanie U.S. Government: Fontenot, Keith	Health care reform
03/06/09	Meeting	30 minutes	AHIP: Ignagni, Karen; Donahue, Mary Beth U.S. Government: Summers, Larry	Health care reform
03/06/09	Meeting	1 hour	AHIP: Bocchino, Carmella U.S. Government: Emanuel, Zeke; Kocher, Bob Other: Kahn, Chip (FAH); Carrigan, Janet (NQF); Shea, Jack (AFL-CIO); Porter, Ken (ABC); Nielsen, Nancy (AHA); Corlette, Sabrina (NPWF)	Stand for Quality Initiative
03/09/09	Board meeting	1 hour	AHIP: AHIP Board U.S. Government: Summers, Larry	The White House health care agenda
03/10/09	Meeting	1 hour	AHIP: Bocchino, Carmella U.S. Government: Emanuel, Zeke; Kocher, Bob Other: Fischer, Don (Highmark BCBS); Kang, Jeff (CIGNA); Popiel, Richard (Horizon BCBSNJ); Sandy, Lewis (UHG); Weissberg, Jed (Permanente Federation)	Quality and health care reform
03/10/09	2009 AHIP National Policy Forum	1 hour	AHIP: Public Conference with AHIP attendees U.S. Government: Orszag, Peter	General Session - Putting Health Care on a Sustainable Path
03/11/09	Meeting	1 hour	AHIP: Ignagni, Karen; Donahue, Mary Beth U.S. Government: DeParle, Nancy-Ann Other: Gellert, Jay (HealthNet)	Health care reform
03/16/09	Call	30 minutes	AHIP: Bocchino, Carmella U.S. Government: Clancy, Carolyn	Stand for Quality initiative

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03/24/09	Call	30 minutes	AHIP: Ignagni, Karen U.S. Government: Kocher, Bob	Unknown
03/27/09	Meeting	30 minutes	AHIP: Ignagni, Karen; Donahue, Mary Beth U.S. Government: Tanden, Neera Other: Jay Gellert (HealthNet)	Health plan issues
03/30/09	Call	30 minutes	AHIP: Ignagni, Karen; Bocchino, Carmella U.S. Government: Emanuel, Zeke	Electronic billing and standards utilization
04/07/09	Call	30 minutes	AHIP: Bocchino, Carmella; Ignagni, Karen U.S. Government: Emanuel, Zeke	Billing methods
04/16/09	Board meeting	Approximate 1 hour	AHIP: AHIP Board U.S. Government: DeParle, Nancy-Ann	The Obama Administration's health policy agenda
04/20/09	Meeting	45 minutes	AHIP: Ignagni, Karen U.S. Government: DeParle, Nancy-Ann Other: Rivera, Dennis (SEIU); Sachs, Jeff (Sachs Consulting); Raske, Ken (Greater N.Y. Hospital Association)	Cost containment
04/29/09	Meeting	Approximate 1.5 hours	AHIP: Ignagni, Karen; U.S. Government: DeParle, Nancy-Ann Other: Deem, Rich (AMA); Dauner, Duane (CA Hospital Association); Galvin, Bob (GE); Gellert, Jay (HealthNet); Nexon, David (AdvaMed); Priselac, Tom (Cedars-Sinai Medical Center, and Chair of AHA); Raske, Ken (Greater N.Y. Hospital Association); Heller, Karen (Greater N.Y. Hospital Association); Rich, David (Greater N.Y. Hospital Association); Rivera, Dennis (SEIU); Sachs, Jeff (Sachs Consulting); Cooper, Jon (Sachs Consulting); Umbdenstock, Rick (AHA)	Stakeholder group meeting
05/11/09	Meeting	Approximate 1 hour	AHIP: Ignagni, Karen U.S. Government: Obama, Barack Other: Halvorson, George (Kaiser), various members of the Stakeholder Group	Stakeholder group meeting
05/18/09	Call	30 minutes	AHIP: Ignagni, Karen U.S. Government: Kocher, Bob	Unknown

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05/26/09	Meeting	1 hour	AHIP: Ignagni, Karen; Keefer, Scott U.S. Government: Sebelius, Kathleen Other: Gellert, Jay (HealthNet); Halvorson, George (Kaiser)	Health plan issues
06/30/09	Meeting	1 hour	AHIP: Ignagni, Karen U.S. Government: DeParle, Nancy-Ann	Unknown
07/01/09	Call	30 minutes	AHIP: Ignagni, Karen U.S. Government: Kocher, Bob	Unknown
07/10/09	Meeting	1 hour	AHIP: Ignagni, Karen; Bocchino, Carmella U.S. Government: Wakefield, Mary	Health care reform; building stronger communities, HIT, aligning cost containment with safe and high quality health care
07/24/09	Meeting	2 hours	AHIP: Ignagni, Karen; Bocchino, Carmella U.S. Government: DeParle, Nancy-Ann (and staff) Other: Members of Stakeholder Group; Halvorson, George (Kaiser)	Stakeholder group to offer feedback to administration. General discussion / health care reform
08/06/09	Meeting	1 hour	AHIP: Ignagni, Karen; Bocchino, Carmella; Thornton, Jeanette U.S. Government: Chopra, Aneesh; Emanuel, Zeke; Kocher, Bob; Simas, David	Administrative simplification
09/29/09	Meeting	30 minutes	AHIP: Ignagni, Karen U.S. Government: Orszag, Peter	Economic impact of health care reform
10/07/09	Meeting	1 hour	AHIP: Ignagni, Karen; Bacher, Gary; Donahue, Mary Beth U.S. Government: DeParle, Nancy-Ann; Summers, Larry	Economic impact of health care reform
11/20/09	Call	1 hour	AHIP: Bocchino, Carmella U.S. Government: Epstein, Tom; Emanuel, Zeke	Administrative simplification
In or around January 2010	Various calls	Unknown	AHIP: Ignagni, Karen; Bacher, Gary; Bocchio, Carmella (not all participants may have participated on all calls) U.S. Government: Bob Kocher	Health care reform

AHIP's Initial Response to Committee Questions 1 and 2
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In or around January 2010	Various calls	Unknown	AHIP: Ignagni, Karen; Bacher, Gary; Bocchino, Carmella (not all participants may have participated on all calls) U.S. Government: Zeke Emanuel	Health care reform
03/09/10	2010 AHIP National Policy Forum	Approximate 45 minutes	AHIP: Public Conference with AHIP attendees U.S. Government: Sebelius, Kathleen	Health care reform
03/10/10	Call	30 minutes	AHIP: Bocchino, Carmella U.S. Government: DeCaro, Teresa	Consumer web portals
03/17/10	Meeting	1.5 hours	AHIP: Bocchino, Carmella U.S. Government: Smith, Barbara Markham; Kronick, Richard; Block, Lauren; Shelton, Carrie; Corrigan, Dara; DeCaro, Teresa; Moon, Danielle; Arnold, Sharon; Sinclair-James, Brian Other: Hall, Elizabeth (Wellpoint); Danstrom, Russ (Wellpoint); Larreta-Moylan, James (KP); Liu, Ruth (KP); Beauregard, Tom (UHC); Savage, Deirdre (BCBSMA); Peters, Susan	Consumer web portals

Footnote 66

**FEDERATION OF AMERICAN HOSPITALS (FAH)
MEETINGS AND PHONE CALLS RESPONSIVE TO APRIL 18, 2011 REQUEST FROM
THE COMMITTEE ON ENERGY & COMMERCE**

LOG FOR CHARLES N. KAHN III

DATE & TIME	SUBJECT MATTER	PARTICIPANTS	LOCATION
3/2/2009 @ NOON		Bob Kocher	Phone call
3/4/2009 @ 4:30 PM	HQA issues for 2009	Barry Straube	FAH
3/5/2009 @ 12:30 PM	WH Forum on Health Reform		WH
3/6/2009 @ 9:30 AM	Stand for Quality	Bob Kocher, Zeke Emanuel	EEOB
3/30/2009 @ NOON		Nancy Ann DeParle	EEOB
4/17/2009 @ 8:00 AM	Breakfast meeting	Jonathan Blum	Poste Restaurant
4/22/2009 @ 3 PM		Mike Hash	Phone call
4/24/2009 @ 7:30 Am	Breakfast meeting	Jeanne Lambrew	Poste Restaurant
5/1/2009 @ 3:30 PM	CMS Regulation	Jonathan Blum	Phone call
5/5/2009 @ 10:00 AM		Don Berwick	Phone cal
5/7/2009 @ 2:00 PM	Quality	Mike Hash, Janet Corrigan	EEOB
5/8/2009 @ 8:00 AM	Breakfast meeting	Mike Hash	EEOB
5/19/2009 @ 3:00 PM		Marty Rice	Phone call
5/29/2009 @ 11:45 AM	Luncheon meeting	Bridgett Taylor	HHS
6/1/2009 @ NOON	Quality	Jeanne Lambrew, Janet Corrigan	HHS
6/15/2009 @ 5:30 PM		Jon Selib, Nancy Ann DeParle	EEOB
6/26/2009 @ 9:30 AM	Health Reform	Sec. Sebelius	HHS
6/30/2009 @ NOON	Health Reform	John Selib, Jeff Cohen	WH
7/1/2009 @ 5:00 PM	Health Reform	Sen. Baucus, Jon Selib, Nancy Ann DeParle, Jeff Cohen	Phone call
8/11/2009 @ 2:30 PM		Peter Budetti	Phone call
8/18/2009 @ 3:30 PM		Peter Budetti, Clif Gaus	Phone call

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Attorney-Client Communication
Attorney Work Product***

DATE & TIME	SUBJECT MATTER	PARTICIPANTS	LOCATION
9/14/2009 @ NOON		Peter Budetti, Clif Gaus	Phone call
9/18/2009 @ 8:30 AM	Breakfast meeting	Jon Blum	Holiday Inn
11/25/2009 @ 8:00 AM	Breakfast meeting	Carolyn Clancy	Old Georgetown Grille
12/8/2009 @ 2:00 PM		Nancy Ann DeParle	EEOB
12/9/2009 @ 9:30 AM	HQA Mtg.	Sec. Sebelius	HHS
12/18/2009 @ 4:00 PM	Reform	Herb Kuhn	Phone call
4/5/2010 @ 4:00 PM		Marilyn Tavenner	Phone call
4/6/2010 @ 4:00 PM		Nancy Ann DeParle	Phone call
4/14/2010 @ 8:00 AM		Marilyn Tavenner	HHS
4/16/2010 @ 8:30 AM	Breakfast meeting	Peter Budetti, Jeff Micklos	Poste Restaurant
4/19/2010 @ 3:00 PM		Jon Blum	Phone call
6/1/2010 @ 3:00 PM		Bob Kocher	EEOB
6/24/2010 @ 2:00 PM		Mary Wakefield	Phone call
6/30/2010 @ 8:00 AM	Breakfast meeting	Peter Lee	Poste Restaurant
7/1/2010 @ 9:00 AM		Marilyn Tavenner	Phone call
7/12/2010 @ 11:00 AM	Health IT	Marilyn Tavenner , Linda Fishman	Phone call
7/21/2010 @ 5:00 PM		Don Berwick	Phone call
7/30/2010 @ 4:00 PM		Don Berwick, Jon Blum	Phone call
8/5/2010 @ 2:00 PM		Jeanne Lambrew	HHS
9/3/2010 @ 9:30 AM	Hospital Acquired Infections	Marilyn Tavenner	Phone call
9/17/2010 @ 9:00 AM		Peter Budetti	Phone call
9/24/2010 @ 12:30 PM		Peter Budetti	CMS
10/4/2010 @ 12 NOON	Luncheon meeting	Nancy Ann DeParle	WH
10/14/2010 @ 8:00 AM	Breakfast meeting	Peter Lee	Poste Restaurant
10/21/2010 @ 10:00 AM		Kelly Cronin	FAH
10/29/2010 @ 1:30 PM		Nancy Ann DeParle	Phone call
11/1/2010 @ 4:00 PM		Don Berwick, Rich Umbdenstock	HHS
11/8/2010 @ 2:00 PM	Veterans Administration Final Rule	OMB staff, Jeff Cohen, Steve Speil	OMB

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Attorney Work Product***

DATE & TIME	SUBJECT MATTER	PARTICIPANTS	LOCATION
11/18/2010 @ 6:15 PM		Don Berwick, Rich Umbdenstock	Phone call
11/22/2010 @ 4:00 PM	NQF	Don Berwick	HHS
11/22/2010 @ 5:00 PM		Marilyn Tavenner, David Blumenthal, Samantha Burch	HHS
11/23/2010 @ 8:00 AM	Breakfast meeting	Don Berwick	Poste Restaurant
11/30/2010 @ 2:30 PM	Insurance Exchanges	Krista Drobac, Liz Fowler, Joel Ario, Jeff Cohen, Jeff Micklos	HHS
12/14/2010 @ NOON	Luncheon meeting	Todd Park	HHS
12/15/2010 @ 2:00 PM		Peter Lee	Phone call
12/21/2010 @ 8:00 AM	Breakfast meeting	Peter Lee	Poste Restaurant
12/22/2010 @ 7:00 AM	Breakfast meeting	Rick Gilfilan	Poste Restaurant
12/23/2010 @ 11:00 AM	Luncheon meeting	Nancy Ann DeParle	WH
1/4/2011 @ 3:00 PM		Don Berwick	Phone call
1/4/2011 @ 6:00 PM		Peter Lee	Phone call
1/5/2011 @ 2:00 PM		Peter Lee	Phone call
1/6/2011 @ NOON	Delivery reform and Patient safety	Kathleen Sebelius, Don Bewick	HHS
1/14/2011 @ 10:00 AM	Health reform	Tom Daschle and Sr. WH staff	Center for American Progress
2/21/2011 @ 3:15 PM		Nancy Ann DeParle	Phone call
1/24/2011 @ 5:30 PM		Peter Lee	Phone call
2/17/2011 @ 7:00 AM	Breakfast meeting	Don Berwick	Poste Restaurant
2/1/2011 @ 8:00 AM	Breakfast meeting	Carolyn Clancy	Old Georgetown Grille
3/7/2011 @ 4:30 PM		Peter Lee	Phone call
3/8/2011 @ 10:30 AM		Marilyn Tavenner	Phone call
3/9/2011 @ 10:30 AM	Patient Safety Initiative	Don Berwick, Joe McCannon	HHS
3/10/2011 @ 7:30 AM	Breakfast meeting	Marilyn Tavenner	Bistro Bis
3/21/2011 @ 11:30 AM	HCA Meeting	Marilyn Tavenner	Nashville, TN
3/24/2011 @ 11:00 AM	FAH/CMS Challenges & Opportunities	John McGann, Dennis Wagner	HHS
4/11/2011 @ 3:30 PM		Nancy Ann DeParle	Phone call

**FEDERATION OF AMERICAN HOSPITALS (FAH)
MEETINGS AND PHONE CALLS RESPONSIVE TO APRIL 18, 2011 REQUEST FROM
THE COMMITTEE ON ENERGY & COMMERCE**

LOG OF JEFF COHEN

DATE & TIME	SUBJECT MATTER	PARTICIPANTS	LOCATION
6/15/2009 @ 5:30 PM	Health Reform	John Selib, Nancy Ann DeParle, Chip Kahn	EEOB
6/30/2009 @ NOON	Health Reform	John Selib, Chip Kahn	WH
7/1/2009 @ 5:00 PM	Health Reform	Sen. Baucus, John Selib, Nancy Ann DeParle, Jeff Cohen	Phone Call
11/8/2010 @ 2:00 PM	Veteran's Administration Final Rule Meeting	OMB Staff, Chip Kahn, Steve Speil	OMB
11/30/2010	HHS Meeting RE: FAH Views on Exchanges	Krista Drobac, Liz Fowler, Joel Ario, Chip Kahn, Jeff Micklos	HHS

Footnotes 67, 71 – 72, 74 - 75

Attachment A

Meeting Date/Time	Location	AFL-CIO Attendees	White House Attendees	Other Attendees	Subjects Discussed
February 9, 2009 11:00am	West Wing	Bill Samuel John Sweeney	Joe Biden		Stimulus legislation and middle class task force -- health care in passing
February 23, 2009		John Sweeney	Barack Obama	130+ attendees, including union and business leaders and progressive and conservative economists	Fiscal Responsibility Summit -- health care and social security
March 3, 2009 2:00-3:00pm 3:00-4:00pm	White House	Gerry Shea	Barack Obama	Staff from various unions Many	WH Summit on Health Care
March 5, 2009 1:00-5:00pm	White House	Gerry Shea	Barack Obama	Staff from various unions Many	WH Summit on Health Care
March 6, 2009 9:30-10:30am	EOB, Zeke's Office	Gerry Shea	Zeke Emanuel Bob Kocher	SFQ Coalition	Quality measures for health care provision/delivery system reform
March 10, 2009 4pm	OEOB, Rm. 196	Bill Samuel Gerry Shea	Keith Fontenot	SFQ Coalition	Quality measures for health care provision/delivery system reform
March 19, 2009 4:30pm	White House	Bill Samuel John Sweeney	Rahm Emanuel		Sweeney's introduction, health care probably came up
May 7, 2009	White House	Gerry Shea	Mike Hash	SFQ Coalition	Health care delivery system reform -- tentative -- may not have happened
June 1, 2009 1:30pm	Phone	Gerry Shea	Nancy-Ann DeParle	Many	Economic case for health care

Meeting Date/Time	Location	AFL-CIO Attendees	White House Attendees	Other Attendees	Subjects Discussed
June 8, 2009 4:30pm?	White House	Bill Samuel Gerry Shea JoAnn Volk	Christina Romer Jim Messina	Chuck Loveless?	Health care
June 12, 2009	OEOB 263	Gerry Shea	Tina Tchen	Various organizations that represent retirees, ARA, AFSCME, SEIU, AARP	Retiree health care
June 30, 2009 3:00-4:00pm 4:00-5:00pm	Phone and Rayburn B318	Gerry Shea JoAnn Volk	Mike Hash	Congressional staff	Health care delivery system reform
July 7, 2009 1:00pm	White House	Bill Samuel John Sweeney	Rahm Emanuel Jim Messina Nate Tamarin David Axelrod	Gerry McEntee Chuck Loveless	Excise tax – taxing benefits will endanger health care reform
July 9, 2009 July 10, 2009	White House	Bill Samuel John Sweeney Bill Samuel Karen Nussbaum Gerry Shea	Jim Messina Jim Messina	Chuck Loveless Gerry McEntee Leo Gerard Rose Ann DeMoro Harold Shaitberger Barbara Easterling Tom Buffenbarger David Newby Art Pulaski Fred Redmond Chuck Loveless Lee Saunders Larry Scanlon Other union staff	Excise Tax Health Care Reform legislation
July 13, 2009	White House	Rich Trumka Gerry Shea	Barack Obama	David Bonior Elizabeth Bunn	Meeting with President Obama on labor agenda, including

Meeting Date/Time	Location	AFL-CIO Attendees	White House Attendees	Other Attendees	Subjects Discussed
		John Sweeney		Larry Cohen Leo Gerard Ed Hill Terence O'Sullivan Dennis Van Roekel Randi Weingarten James Hoffa Joe Hansen Andy Stern Anna Burger	health care
July 15, 2009 12:00-1:30pm	White House Dining Room	Gerry Shea	Nancy Ann DeParle		Health care – may have been postponed or moved
July 28, 2009 5:45-6:45pm	180 EEOB	Bill Samuel JoAnn Volk	Jared Bernstein (supposed to be Nancy-Ann DaParle) Jim Messina (could not attend)	Affiliates	Health care – excise tax
August 26, 2009 6:30-7:30pm	Phone	Gerry Shea	Tina Tchen Lauren Aronson	Many advocacy group representatives	HHS Report on health insurance reform and seniors
September 9, 2009 9:15-9:45pm	Phone	Gerry Shea	?	Many	WH call on HC speech delivered earlier that evening
September 9, 2009 6:45pm	Phone	John Sweeney	Jim Messina		Health care
September 11, 2009	Phone	Rich Trumka	Jim Messina		Health Care - tax threshold and adjuster, public option and employer mandate, and concern re: labor effort aimed at finance.

Meeting Date/Time	Location	AFL-CIO Attendees	White House Attendees	Other Attendees	Subjects Discussed
September 12, 2009	Phone	Rich Trumka	Jim Messina	None	Health Care
September 15, 2009	Pittsburgh	AFL-CIO Convention	Barack Obama		Multiple topics, including health care
September 24, 2009 11:30-12:30am	White House	Bill Samuel Gerry Shea	Jim Messina	Chuck Loveless	Health care – excise tax
September 28, 2009 11:00am	Phone	Rich Trumka	Barack Obama		Health care
September 29, 2009 2:00pm	White House	Rich Trumka	Nate Tamarin Larry Summers	Tim Geithner; Other union presidents	Economy; health care may have been discussed
September 30, 2009 11:00am	White House	Jon Hiatt Bill Samuel Rich Trumka	Rahm Emanuel Nate Tamarin Jim Messina		Multiple topics including health care
October 7, 2009	Phone	Jon Hiatt	Rahm Emanuel	Other union presidents (conference call)	Health care conference call
October 28, 2009 12:00pm	White House Cafeteria	Gerry Shea	Nancy-Ann DeParle		Health care
November 6, 2009 11:15am	Phone	Bill Samuel	Jared Bernstein		Health care may have been discussed
November 19, 2009 3:30pm	Phone call	Gerry Shea	Mike Hash Nancy-Ann DeParle	SFQ Coalition	Advance payment reform
November 23, 2009 3:00-4:00pm	Phone call	Gerry Shea	Ann Wigard	Many	Insurance Exchange Discussion

Meeting Date/Time	Location	AFL-CIO Attendees	White House Attendees	Other Attendees	Subjects Discussed
November 23, 2009	Treasury	Damon Silvers	Ron Bloom		Health care
December 7, 2009 4:30-5:30pm	White House	Gerry Shea Bill Samuel Arlene Holt-Baker	Jim Messina Patrick Gaspard Nancy Ann DeParle	Several union representatives	White House HC meeting, sot controls; excise tax
December 11, 2009	Starbucks, 15th & I St.	Damon Silvers	Ron Bloom		Health care
December 11, 2009	White House	Bill Samuel	Jim Messina Nate Tamarin		Excise Tax
December 16, 2009	AFL-CIO	Rich Trumka Bill Samuel	Jim Messina Patrick Gaspard Nate Tamarin		Health Care
December 17, 2009	Phone	Rich Trumka	Jim Messina Nate Tamarin		Health Care
December 18, 2009	Starbucks, 15th & I St.	Damon Silvers	Ron Bloom		Health care
December 18, 2009	Phone call	Richard Trumka Damon Silvers	Larry Summers	David Bonoir; other union presidents	Health care
December 18, 2009	Phone	Bill Samuel	Jim Messina Nate Tamarin	Chuck Loveless	Excise Tax
December 21, 2009	White House, 208 OEOB	Bill Samuel Gerry Shea	Peter Orzag Christina Roemer Jason Furman Nate Tamarin Jim Messina	Larry Cohen Chuck Loveless Louise Novotny Joel Solomon Mike Monroe Alan Reuther Steve Kreisberg	Excise tax
January 8, 2010	Starbucks, 15th & I St.	Damon Silvers	Ron Bloom		Health care

Meeting Date/Time	Location	AFL-CIO Attendees	White House Attendees	Other Attendees	Subjects Discussed
January 11, 2010	White House	Rich Trumka No staffers present	Barack Obama	Affiliate presidents	Excise tax
January 13, 2010	White House	Rich Trumka Bill Samuel Kelly Ross	Jason Furman Jim Messina	Larry Cohen Randi Weingarten Gerald McEntee Brain Baker Ed Hill Randy DeFrehn Dteve Kreisberg Joe McMartin Louise Novotny Willard Raabe Dennis Van Roekel Andy Stern Alan Reuther Chuck Loveless Michelle Nawar	Excise Tax
January 13, 201	Phone	Kelly Ross Karin Feldman Bill Samuel Gerry Shea Damon Silvers	Jason Furman Jim Messina	Larry Cohen Alan Reuther Joe McMartin Michelle Nawar	Excise Tax
January 14, 2010	White House	Rich Trumka	Jason Furman Jim Messina Others	Affiliate Presidents	Excise tax
January 14, 2010	Phone	JoAnn Volk Kelly Ross Karin Feldman	Jason Furman		Excise tax
January 15, 2010	Starbucks, 15th & I St.	Damon Silvers	Ron Bloom		Health care

Meeting Date/Time	Location	AFL-CIO Attendees	White House Attendees	Other Attendees	Subjects Discussed
January 21, 2010	Phone	Gerry Shea	Nancy-Ann DeParle		Health care
January 22, 2010	Starbucks, 15th & I St.	Damon Silvers	Ron Bloom		Health care
January 28, 2010 4:00-5:00pm	Phone	Gerry Shea	?	Many	WH Health Reform call
January 29, 2010	Starbucks, 15th & I St.	Damon Silvers	Ron Bloom		Health care
January 2010	Common Purpose Meeting at Capital Hilton	Damon Silvers	Larry Summers	Many	Health care
February 5, 2010	Starbucks, 15th & I St.	Damon Silvers	Ron Bloom		Health care
February 17, 2010 1:30-2:30pm	?	Gerry Shea	?	?	WH health insurance
February 19, 2010	Starbucks, 15th & I St.	Damon Silvers	Ron Bloom		Health care
February 25, 2010 5:00-6:00pm	White House	Bill Samuel Rich Trumka	Jim Messina	Many	Bipartisan summit, multiple topics including health care
March 3, 2010 1:00-4:00pm	White House	Gerry Shea John Sweeney? Rich Trumka?	Barack Obama	Many	Obama speech on health care
March 4, 2010	Treasury	Damon Silvers	Ron Bloom		Health care
March 8, 2010 4:00-5:00pm	White House EEOB 222	Bill Samuel Damon Silvers	Jared Bernstein		Health care may have been discussed (per Bill S); Damon says health care not discussed

Meeting Date/Time	Location	AFL-CIO Attendees	White House Attendees	Other Attendees	Subjects Discussed
March 17, 2010 2:45-4:00pm	White House	Rich Trumka Bill Samuel	Barack Obama Kristin Sheehy Rahm Emanuel Jim Messina		Health care
March 18, 2010 6:00-7:00pm	?	Bill Samuel Rich Trumka	Jim Messina		Health care may have been discussed
March 23, 2010 10:00am	Dept of Interior	Rich Trumka Gerry Shea	Barack Obama	Many	Signing of health care bill and reception
March 23, 2010	Treasury	Damon Silvers	Ron Bloom		Health care

Footnotes 68, 76 - 77

Attachment A

AFSCME (M)eetings, (P)hone calls and/or (T)eleconferences with White House Officials Regarding Health Care Reform								
Date	Duration	Event	Location	AFSCME Attendees	WH Attendees	Other Attendees	Subjects	Notes
3/5/09		M	WH	Steve Kreisberg	Pres. Obama (various others)	100+ people representing various organizations	Health care reform	Kreisberg attended in place of McEntee
3/13/09	10A -	M	WH	Barbara Coufal	Jean Lambrew Neera Tanden	R. Kirsch (HCAN) D. McDonough (HCAN) K. Davenport (Center for American Progress) M. Nawar (SEIU) J. Waxman (Nat'l Women's Law Center) M. Silver (USAction) NEA representative	Health care reform	Mtg. postponed; uncertain of date of rescheduled mtg.
Late 3/09		M		Charles Loveless	Jim Messina	Various advocacy group reps.	Health care reform	Mtg. proposed, but may not have occurred
4/7/09	1:30P-	M	WH	Gerald McEntee	VP Biden		Possible discussion of health care	
4/17/09	2P -	M	WH	Steve Kreisberg	Nancy-Ann DeParle Tina Tchen	Various advocacy group reps.	Health care reform	
5/8/09	11A-12P	M	OEOB	Gerald McEntee Lee Saunders Steve Kreisberg Barbara Coufal	Nancy-Ann DeParle		Health care reform, delivery system. AFSCME priorities & field program	
6/24/09	11:30A	P		Charles Loveless	Jim Messina	Kim Molstre	Possibly health care	
7/7/09	1P-	M	WH	Gerald McEntee Charles Loveless	Rahm Emmanuel Jim Messina Nate Tamarin David Axelrod	John Sweeney (AFL-CIO) Bill Samuel (AFL-CIO)	Health care excise tax, other health care issues	
7/9/09	4:30P -	M	WH	Charles Loveless	Jim Messina	Bill Samuel	Excise tax	
7/10/09	8A-	M/T	AFL-CIO & phone	Gerald McEntee Lee Saunders Larry Scanlon Charles Loveless	Jim Messina	John Sweeney (AFL-CIO) Leo Gerard (USW) Tom Buffenbarger (IAM) Rose Ann DeMoro (CNA/NNOC) Barbara Easterling (ARA) David Newby (WI AFL-CIO) Art Pulaski (Cal. Fed. Labor) Fred Redmond (USW)	State of health care reform legislation, labor program for health care reform	Meeting of AFL-CIO Health Care Reform Campaign

						Harold Schaitberger (IAFF) Bill Samuel (AFL-CIO) Karen Nussbaum (Working America) Gerry Shea (AFL-CIO) Various union staff		
7/13/2009	1:15P-	M	WH	Gerald McEntee	Pres. Obama (others?)	David Bonior (NLCC) Elizabeth Bunn (UAW) Anna Burger (CtW) Larry Cohen (CWA) Leo Gerard (USW) Joe Hansen (UFCW) Ed Hill (IBEW) James Hoffa (IBT) Terence O'Sullivan (LIUNA) Andy Stern (SEIU) John Sweeney (AFL-CIO) Dennis Van Roekel (NEA) Randi Weingarten (AFT) Rich Trumka (AFL-CIO) (possibly union staff)	Labor policy priorities (including health care)	Meeting of National Labor Coordinating Committee unions
7/28/09	5:45P-	M	EEOB 180	Charles Loveless	Nate Tamarin Jim Messina Nancy-Ann DeParle Peter Orzag		Excise tax	
7/29/09	12P-	M	WH	Barbara Coufal	Unknown	50+ advocacy group representatives	Health care, including polling	
8/11/09	4P-8P	M	UFCW	Gerald McEntee Paul Booth	Jim Messina	Various NLCC union presidents David Bonior (NLCC) Speaker Pelosi (by phone)	Pension, EFCA, Health Care	Unclear whether McEntee or Booth attended this mtg., Messina scheduled to speak to group at 5:30
Mid 08/10		P		Charles Loveless	Jim Messina		Health care, public option	Not certain that call was placed, but likely so
Early 9/09		P		Gerald McEntee	Jim Messina		Health care, probably public option	
Early 9/09		P		Charles Loveless	Jim Messina		Health care, probably public option	Not certain that call was placed, but likely so
Early 9/09		P		Gerald McEntee	Rahm Emmanuel		Health care, probably public option	Not certain that call was placed, but likely so

Early 9/09		P		Gerald McEntee	Nancy-Ann DeParle		Health care, probably public option	Not certain that call was placed, but likely so
Early 9/09		P		Lee Saunders	Patrick Gaspard		Health care, probably public option	Not certain that call was placed, but likely so
Early 9/09		P		Barbara Coufal	Lauren Aronson		Health care, probably public option	Not certain that call was placed, but likely so
9/19 or 9/20/09		P		Gerald McEntee	Rahm Emmanuel		Medical CPI, public plan, employer mandate	Probably phone call, possibly a meeting
9/24/09		M	West Wing	Charles Loveless	Jim Messina	Bill Samuel (AFL-CIO) Gerry Shea (AFL-CIO)	Health care, excise tax	
9/29/09	2P-	M	WH	Gerald McEntee	Sec. Geithner Lawrence Summers Nate Tamarin (others?)	Rich Trumka (AFL-CIO) David Bonior (NLCC) Various NLCC union presidents	Economy (possible that health care was discussed)	Rahm Emmanuel possibly dropped in on meeting
10/7/09	2:30P-	T	Phone	Gerald McEntee	Rahm Emmanuel	Various NLCC union presidents	Health care reform	
Mid 10/09		Email		Charles Loveless	Jim Messina		AFSCME taking out print ads with other unions criticizing committee bill	Email not discovered but likely sent
Late 10/09		Email		Charles Loveless	Jim Messina		AFSCME concern re: WH preference for trigger over opt-out for public option	Email not discovered, but likely sent
12/7/09	4:30-5:30	M	Roosevelt Room	Charles Loveless	Jim Messina Patrick Gaspard Nancy-Ann DeParle	Larry Cohen (CWA) Joe Hansen (UFCW) John Stocks (NEA) Terence O'Sullivan (LIUNA) Alan Reuther (UAW) Arlene Holt Baker (AFL-CIO) Bill Samuel (AFL-CIO) Gerry Shea (AFL-CIO)	Excise tax	
12/11/09	12P-	M	VP Office/ Sen. Recept. Room	Charles Loveless	Jim Messina Nate Tamarin	Bill Samuel (AFL-CIO)	Excise Tax	
12/18/09	1:30P-	P		Charles Loveless	Jim Messina Nate Tamarin	Bill Samuel (AFL-CIO)	Excise tax	
12/18/09	4:15P – 5:25P	T	Phone	Gerald McEntee	Lawrence Summers	Various NLCC union presidents	Health care reform, job creation	
12/21/09	12:30P-	M	WH	Steve Kreisberg Charles Loveless	Peter Orzag Jason Furman Christina Roemer	Gerry Shea (AFL-CIO) Bill Samuel (AFL-CIO) Reps from various organizations	Excise tax	

					Nate Tamarin Jim Messina			
Early 1/10		P	Phone	Gerald McEntee	Jim Messina		Excise tax, exchanges	Uncertain when call took place
1/11/10	4:30P-5P	M	WH	Gerald McEntee	Pres. Obama (others?)	Various NLCC union presidents	Excise tax	
1/13/10	9A – 12A	M	EEOB	Gerald McEntee Charles Loveless Steve Kreisberg	VP Biden Sec. Sebelius Jim Messina Jason Furman (others?)	Rich Trumka (AFL-CIO) Ed Hill (IBEW) Randi Weingarten (AFT) Andy Stern (SEIU) Dennis Van Roekel (NEA) Larry Cohen (CWA) Various union staff	Excise tax	Union presidents kept in one room, union staff kept in another. Union staff had only incidental contact with administration officials
Mid 1/10		Email		Charles Loveless	Jim Messina		Employer mandate and market reforms as applied to state/local govt; Inclusion of state and local employees in bill	Email not discovered, but likely sent
2/22/10		P	Phone	Charles Loveless	Nate Tamarin		Excise tax	
3/12/10	3:30P-	M	AFSCME	Gerald McEntee Lee Saunders Charles Loveless	Jim Messina Nate Tamarin Patrick Gaspard		Possible discussion of health care	
4/23/10		M	WH	Jessica Weinstein	Reps from WH Office of Public Engagement, Reps from WH Office of Health Reform	Reps from Dept. of Health and Human Services Reps of various organizations	Early retiree reinsurance implementation	

Footnotes 69, 78 - 80

Attachment A

Meeting Date/Time	Location	SEIU Attendees	White House Attendees	Other Attendees	Subject Discussed
March 5, 2009 1:00 -5:00 P.M.	White House	Andy Stern Anna Burger Dennis Rivera	Barack Obama and Staff	Staff from various unions	White House Forum on Health Reform; Cost and Coverage of Health Care. <i>See March 2 talking points.</i>
March 5, 2009 10:00 -11:00 P.M.	Democracy Alliance Conference, FL	Andy Stern	Jim Messina		
April	Various, including SEIU	Dennis Rivera	Nancy-Ann DeParle		Discussions concerning building a coalition of companies supporting health care reform
April 13, 2009 4:15 – 5:00 P.M.	White House	Andy Stern Anna Burger Dennis Rivera	Nancy-Ann DeParle		<i>See 4/10 DeParle talking points</i>
April 15, 2009	Democratic Senatorial Campaign Committee	Michelle Nawar	Jim Messina	Reps. From AARP, NFIB, Chamber of Commerce, John Selib (Baucus Staff)	Commitment of Public Support for Legislation by Meeting Participants
April 15, 2009	White House	Dennis Rivera	Joe Biden?		
April 30, 2009 1:30 – 2:30 P.M.	White House	Anna Burger	Patrick Gaspard		May not have concerned health care
May 11, 2009 11:00 – 1:00 P.M.	White House	Andy Stern Dennis Rivera Michelle Nawar	Barack Obama? Jim Messina		Health Care Summit Status of House and Senate bills
May 12, 2009 5:30 – 6:30 P.M.	White House	Andy Stern Anna Burger	Barack Obama? Jim Messina	AARP Rep.	<i>See 5/12 talking points</i>

Meeting Date/Time	Location	SEIU Attendees	White House Attendees	Other Attendees	Subject Discussed
		Michelle Nawar Bruce Colburn			
June 1, 2009 2:00 - 3:00 P.M.	White House	Andy Stern Anna Burger	Andrew Grossman John Podesta Jim Messina Nancy-Ann DeParle	Many	Health Care Forum
June 30, 2009	White House	Michelle Nawar Dennis Rivera	Rahm Emanuel		
July 13, 2009 1:15 – 2:00 P.M.	White House	Andy Stern	Barack Obama	National Labor Coordinating Committee Members	Labor Agenda including short discussions of Health Care
July 20, 2009	White House	Michelle Nawar			
July 24, 2009	White House	Dennis Rivera			
July 28, 2009	White House	Michelle Nawar	Jim Messina Nancy-Ann DeP arle		Status of Senate bills
July 29, 2009	White House	Andy Stern	Kathleen Sebelius		Better Health Care Together Presentation. See <i>7/29 talking points</i>
September 9, 2009 9:15 – 9:45 P.M.	White House Staff Conference Call	Michelle Nawar		Many	Health Care Status, President's speech that day
September 17, 2009	White House	Michelle Nawar	Nancy-Ann DeParle		
September 18, 2009 3:30 – 4:30 P.M.	White House	Anna Burger	Patrick Gaspard		
September 18, 2009	White House	Andy Stern Anna Burger Dennis Rivera Michelle Nawar	Nancy-Ann DeParle Jim Messina Patrick Gaspard	Erik Smith John Podesta	Baucus bill, SEIU Concerns about bill, including the absence of public

Meeting Date/Time	Location	SEIU Attendees	White House Attendees	Other Attendees	Subject Discussed
					option plan. Triggers. See 9/15 <i>talking points</i>
October 2, 2009 1:00 – 2:00 P.M.	White House	Andy Stern Anna Burger	Aaron Pickrell Jim Messina	Unity 09 Members	May not have concerned health care
October 7, 2009	White House	Anna Burger	Rahm Emanuel	Other union leaders	Health care conference call – may not have happened
November 19, 2009 5:00 – 6:00 P.M.	White House	Andy Stern Anna Burger Dennis Rivera Michelle Nawar	Nancy-Ann DeParle Jim Messina Rahm Emanuel	John Podesta David Krone (Reed's Office)	Concerns about Senator Reed's Bill; Affordable Health Care Coverage
December 7, 2009 4:30-5:30 pm	White House	Michelle Nawar	Jim Messina, Patrick Gaspard, Nancy Ann DeParle	Other union leaders	White House HC meeting, excise tax
December 18, 2009 4:00 – 4:30 P.M.	Telephone Call	Andy Stern	Larry Summers	Union leaders, including NLCC	Cost Control; Excise Tax
January 11, 2010 4:30 – 6:00 P.M.	White House	Andy Stern Anna Burger	Barack Obama	Change That Works Union Leaders, AFL-CIO Leaders	Excise Tax
January 12, 2010	White House	Dennis Rivera	Patrick Gaspard		
January 13, 2010 9:30 – 11:00 A.M.; 12:30 – 5:00 P.M.	White House OEOB	Andy Stern, Anna Burger Michelle Nawar	Joe Biden Jim Messina Jason Furman	Union Leaders including AFL-CIO Unions	Excise Tax
January 14, 2010 2:00 – 3:00 P.M.	White House OEOB	Michelle Nawar	Patrick Gaspard Jim Messina Nate Tamarin		Excise tax

Meeting Date/Time	Location	SEIU Attendees	White House Attendees	Other Attendees	Subject Discussed
February 11, 2010 5:30 – 6:30 P.M.	White House	Andy Stern Anna Burger	Jim Messina Nate Tamarin		May not have concerned health care
February 16, 2010	White House Staff Conference Call	Michelle Nawar		Many	Health Care legislation status
March 9, 2010	White House Staff Conference Call	Michelle Nawar		Many	Health Care legislation status
March 22, 2010 12:00 – 12:10 P.M.	Telephone Call White House	Andy Stern	Barack Obama		Health Care legislation status
March 23, 2010 10:00 A.M.	Interior Department Signing Ceremony	Andy Stern, Bruce Colburn, Michelle Nawar, Lori Lodes	Barack Obama	Many	